Item Worksheet—Item 3.2

Prepare one Item Worksheet for each Item, capturing the 6–10 most important strengths and opportunities for improvement based on the district's response to the Criteria requirements and its key business/organization factors.

(Use the mouse or arrow keys to move from section to section and within a section.)

Indicate the 4–6 most important key business/organization factors relevant to this Item.

(Use the mouse or arrow keys to move to a new key factor. Hitting the Return key will generate an additional number.)

1. Key student segments: regular, special education, ESL, ESP, LCC, and NCS
2. Student and stakeholder requirements/key success factors (KSFs): academic excellence; high-quality curricula and instruction; friendly, supportive, and safe learning environment; effective support services; and effective and efficient fiscal management and operations (Figure P.1-2)
3. Performance Excellence System (Figure P.2-1)
4. Strategic challenges—Education/learning: Be agile and respond to changing performance expectations such as those mandated by NCLB; address poverty-based gaps in levels of readiness to learn
Operational: Achieve organizational agility; integrate technology as a learning tool; maintain safe learning environment and facilities; manage in environment of changing funding patterns
Human resource: Attract and retain highly qualified employees; nation's shortage of teachers
Community-related: Engage parents, community, and business in collaborative learning efforts
5. Four key stakeholder groups: parents, taxpayers, the school board, and businesses
6. Sources of competitive and comparative data: ASDE, ASBE, USEA, United States Assessment of Educational Progress (USAEP), Anywhere Assessment of Educational Progress (AAEP), Scholastic and Predictive Aptitude Tests (SAT and PSAT, respectively), Education Survey Consortium (ESC), United State School Business Officers (USSBO), and Junoflower Consortium

Include an indication of the relative importance/strength of the comment by using ++ or - - as appropriate.

Include a reference to the most relevant key factor(s).

Include an indication of which process evaluation factors are addressed in this comment (refer to page 5 in the full version of the scorebook):

A=Approach D=Deployment L=Learning I=Integration

(Use the mouse or Ctrl Tab to move to the next column within the comment field; use the Rtn or Enter key to begin a new comment.)

+/++	Item Ref.	KF Ref.	A/D/ L/I	Strengths (Include figure references, as appropriate.)
+	a(1,2)	1,5	D	The district uses the four-step iterative Relationship Management Process to identify relationship needs (Figure 3.2-1), select and develop relationship management methods, deploy these approaches, and assess and improve the effectiveness of its relationship management. The applicant has established multiple access mechanisms for students and stakeholders to find information, make complaints, and/or communicate with the district (Figure 3.2-1) and uses the Relationship Management Process to determines contact requirements for each mode of access (Figure 3.2-2). **SVI #1**
+	a(3)	1,2,5	A,D,L	The district uses a six-step Inquiry and Problem Management (IPM) Process (Figure 3.2-3) to resolve complaints within one to five business days, depending on the complexity of the complaint/problem. The "owner" of the issue has responsibility to resolve the issue, conduct follow-up, and log information into the IPM system. Complaints are resolved at the lowest level and then aggregated, analyzed, and included in the SPP, Student and Stakeholder Requirement Determination Process, and Relationship Management Process to support organizational improvement. **SVI #2**
+	b(1)	1,3,5	A,L	The applicant's five-step Satisfaction Determination Process provides a framework to identify student and stakeholder satisfaction and dissatisfaction. The district uses a number of formal and informal mechanisms to assess stakeholder satisfaction, including focus groups and annual surveys of students, parents, alumni, school board members, taxpayers, and business leaders. Data are aggregated by segments, gap analyses are used to identify perceptual differences among student and stakeholder groups, and results are reported through communication vehicles such as *K-news*. **SVI #3**
+	b(3)	6	A	The district participates in the Education Survey Consortium, which provides it with national comparative data on student and stakeholder satisfaction. This information is supplemented with information and best practices from state and other education forums. **SVI #3—address as part of the 5-step Satisfaction Determination Process**

+	b(4)	3	A,L	By including a process improvement focus in the last step of the Satisfaction Determination, Relationship Management, and Inquiry and Problem Management processes, the district keeps its approaches to building and maintaining relationships and determining satisfaction current with educational service needs and directions. **Piece of SVI #1, SVI #2, SVI #3—address in each SVI for each process**
– /– –	**Item Ref.**	**KF Ref.**	**A/D/ L/I**	**Opportunities for Improvement (Include figure references, as appropriate.)**
--	a(1)	1,4,5	A	While the district has identified relationship and contact requirements for its students and key stakeholders (Figure 3.2-1), it does not appear to identify and track those needs by other segments, such as taxpayers with and without children, businesses, English as a Second Language (ESL) students, and New Chance for Success (NCS) students. In addition, the processes used to build positive referrals and foster new and continuing interactions for any stakeholder group are not clearly described. Without such processes, the effectiveness of the district's relationship management approaches may be limited. **SVI #4, ties to SVI #1 and is a double minus opportunity for improvement**
-	a(2)	1,4,5	D, I	Although student and stakeholder contact requirements are covered in orientation and staff training, it is not clear how contact requirements are deployed to all people and integrated into all processes involved in maintaining relationships. **SVI #1**
-	a(3)		D	It is not evident how complaints are aggregated and analyzed for use by the district's technology partners, which may limit the ability of these partners to help the district deploy and support its technology plan. **SVI #2**
-	b(1)	1,4,5	A,D	While the district regularly conducts surveys and focus groups of its students and key stakeholders, it is not clear to what extent the methods of determining satisfaction differ for the diverse student and stakeholder populations the district describes in its Organizational Profile (e.g., student segments with differing languages, educational needs, and economic levels). Also, it is not evident to what extent indicators of dissatisfaction, other than complaints, are collected and used for corrective action so that the district can exceed student and stakeholder expectations. **SVI #3**
-	b(2)	4	D	While the district uses various mechanisms (e.g., surveys and phone calls) to follow up on the satisfaction of students and stakeholders with specific programs, events, and student services, it is unclear whether a systematic process is in place to receive prompt and actionable feedback on the primary educational, developmental, and community education offerings. Without such a process, the district may be limited in its ability to assess satisfaction with existing programs and plan improvements. **??**

Item Worksheet—Item 3.2 **Percent Score**

Guidance on completing Process Item Site Visit Issue Worksheets

The objective of the Process Item Site Visit Issue Worksheet example is to demonstrate how to effectively address appropriate Strengths and Opportunities for Improvement (OFIs) while minimizing the number of Site Visit Issues (SVIs) for the Item.

The essential approach is to develop the SVI strategy around the PROCESS. In this example, three key processes address relationship and satisfaction management for the organization. The methodology around the creation of the SVI is this:

You, as an Examiner, will be meeting with the organization's process owner(s), teams, and/or key personnel involved in the three processes specified in the SVI Worksheets. This will typically be the first day of a site visit in a conference room during category reviews. One SVI strategy crafted around a process can address all the Strengths and OFIs identified in the Item Worksheet for that process. You can more effectively create a set of questions that flow through the process APPROACH, DEPLOYMENT, LEARNING, INTEGRATION, and RESULTS, including the identification of key documents, executive questions, and walk around questions that pertain to this process.

This approach enables you to have a very good understanding of the organization's Strengths and OFIs and some good preliminary clarification and validation of comments in your Item Worksheet. At the end of the first day on site, you should be able to effectively draw some preliminary conclusions and identify where you need to spend more time in the following days of the site visit, to draw final conclusions.

This approach makes for a longer SVI summary of findings, as you should address the findings of every question asked, including evidence provided. Also, the conclusion will be a bit longer, as you should address the effect of your findings on each Consensus comment. However, this creates a very effective and succinct audit trail for the team and the judges to follow. Plus, during the site visit, you don't have to be shuffling lots of papers—the questions are in front of you on one page.

One caveat. In a double negative (- -) Item comment, you should create a separate SVI for each to identify a strategy that gets to the heart of this OFI and clearly addresses the approach, findings, and conclusions of this potentially significant weakness.

Site Visit Issue Worksheet (Record only one issue per page.)

Item Reference: 3.2-1 *Not originally evaluated at consensus* ______

Issue: **Verify and clarify the deployment, cycles of improvement, and integration of the Relationship Management Process.**

Comment(s) affected: (An SVI addresses one or more comments in the consensus scorebook so that by the end of the site visit all OFI's, double pluses, and strength comments linked to a key theme in the final scorebook have been verified or clarified. List the comments found in the consensus scorebook that are addressed by the findings and conclusions concerning this issue, *e.g., 1.1 first +, 1.1 first OFI, KTa.2, and 5.3 second +*)

Strengths 1 and 5; OFI 2

Strategy: (What information do you need, and how do you intend to obtain it, i.e., persons to interview, specific questions to ask each person [including walk-around questions to check deployment], specific documents to review and for what purpose, and observations to make? Be sure your strategy will address the overall issue as well as the comments listed above.)

Interview the owner of the Relationship Management Process(es) and address the following questions:

1. Describe the 4-step process (Strength # 1)
2. What are the key relationship management processes (critical points of contact)? – (Help to address OFI # 2)
3. How do you identify relationship needs ? Look for evidence that some complaint data (See SVI 3.2-2) are used for this determination.
4. From those needs how do you select and develop relationship management methods?
5. What are the "multiple access methods for students and stakeholders to find information, complain, or communicate?
6. How are methods AND relationship needs DEPLOYED to critical points of contact so that staff understand needs and expectations? (OFI # 2)
7. How do you evaluate and improve the process. Look for evidence of benchmarking, best practices, actual improvements made, other innovative ways to improve. (Strength # 5)

Look for any linkages between improvements made and how they relate to changing educational service needs and directions, or changing stakeholder expectations. (see if these changes tie to Item 3.1 market assessment or Item 2.0 strategy development)

Documents:

1. Evidence of student and stakeholder contact requirements covered in training materials used for orientation and staff (OFI + 2 validation)
2. Documented relationship management process (do people understand the process and how it is communicated, improved)
3. Evidence of clearly define student and stakeholder needs (linkage to Item 3.1) and how they are considered in Strategic planning (Item 2.0)

Walk-around question – specifically for student and stakeholder contact staff

1. What are the key student needs? Stakeholder needs?

How do you track inquiries from student and stakeholders and what do you do with that information?

Findings: (What observations, specific answers, and/or updated results did you find during the site visit? Be specific and include data as appropriate.)

Note: the reason to use numbers to identify questions is so that when you write findings, you address the specific strategy question. That provides a good audit trail between strategy and findings.

1. Dr. Sue Peters, Director of Public Relations, described and further articulated the description in the application.

2. Dr. Peters clarified that within the relationship management process, there are 4 phases that comprise a number of key points of contact, or opportunities for capturing or disseminating information that is critical in maintaining productive and positive relationships with stakeholders, students, and parents. The key individuals responsible for these critical points of contact are first informed of their role and responsibility during orientation, then their performance on the job is reinforced through the system design. The system design includes measures on gathering and deploying each of these contact methods and the process owner, Dr. Peters, monitors these measures monthly. The overall system is designed with adequate detail to ensure information that is captured through the multiple

listening and learning methods is used appropriately within the organization. When questioned randomly on selected methods, Dr. Peters described how data were collected, who was responsible for doing it, and the process used to manage or communicate what was learned. For example, when discussing exit interviews with former students, she described how positive and negative feedback was triaged as appropriate, typically forwarded to principals, then given to faculty both verbally and through recording the information in a data field in the individual performance plan. Further, overall satisfaction data are captured and used by the DELT as input in strategic planning. Dr. Peters showed the interview team the orientation content covering roles and responsibilities for deployment of the relationship management process.

3. Dr. Peters, through use of an illustration and accompanying text, which is available to all employees on the intranet site, explained that the relationship management process was developed and improved over 4 cycles of improvement to its current state. She further explained that information is continually collected and the process itself is reviewed and improved yearly. The district primarily uses complaint data, follows trends in higher education requirements, and follows parent and student preferences to detect new or additional needs. (During a separate interview, a staff member at Hilltop Elementary School, who is the owner of the Inquiry and Problem Management [IPM] process at her school, illustrated how she resolved a variety of issues and logged information into the IPM system for further aggregation and analysis.)

4. Dr. Peters described the process for selecting and developing relationship management methods, walking through the current phases of attracting, setting up, maintaining/retaining, and assessing and improving the effectiveness of relationship management. She described that the district manages the various inputs at the school or district level, then in the fourth phase the DLT and DELT review various assessment methods to ensure the methods are effective. She used an example (in addition to the one offered in the application) of managing complaints that students taking courses in mechanics did not acquire necessary skills to monitor computerized sensors in new cars. This issue was addressed the next year through an adjusted curriculum. She described that in the fourth phase the DELT would hopefully see focus group data from local employers showing improved perceptions regarding the curricula changes in this area. The DELT looks for further improvement that can be made within these phases. For example, they learned that frequent and focused communication in each of these phases has been critical, and small yet important changes made to messages and communication methods support and improve relationship management each year.

5. Dr. Peters further explained the multiple access methods described on page 5, Figure 3.2-2 of the application. She showed the interview team the information packet provided to parents, and described how specific numbers are included as appropriate to student and parent needs and preferences learned during the parent interview. Each method is described to parents by staff members conducting interviews to ensure parents understand how to find information, complain, and communicate. All numbers and addresses are recorded during this setup phase of the relationship management process. Likewise the school learns critical requirements for contacting parents, which is further described in the next question response.

6. Dr. Peters further detailed the orientation process for those staff members responsible for critical points of contact, showing job aids provided to assist these staff members in their work, and how measures are used to ensure critical information, including contact requirements, are deployed to teachers and staff. Performance measures are listed in the individual performance plans of key staff so that they are aware of, and receive feedback on, the importance of gathering and disseminating this information. Dr. Peters further detailed how contact requirements for the parents are gathered during the setup phase of the relationship management process and how those requirements are captured in the database. All teachers, staff, and social workers see these requirements on the initial data screen that appears when a query is made on a particular student record in the Student Information Management System (SIMS). Dr. Peters gave the example of the large number of parents who work the night shift at the Ace Factory who request that they are not called before noon except in the case of emergency. When faculty or staff wish to access the phone number of the student, they would immediately be alerted to this requirement.

7. As stated in question 4, Dr. Peters provided examples of actual improvements made as a result of Step 4, assessing and improving the process. Beyond these examples, no evidence was provided of benchmarking or use of best practices. The changes made in some cases reflect changing stakeholder expectations.

Conclusions: (What is the resolution of this site visit issue based on your findings? For each comment referenced in “Comments affected” indicate 1) the action you will take, e.g., delete/modify/no change; 2) the specific findings that lead you to that action, and 3) the final wording of the comment as it will appear in the site visit scorebook. If a new comment is required it should be included in this section as well.)*Note: Conclusions should address actions taken as a result of finding for Strength # 1 and # 5, and OFI # 2*

1. Strength 1 is verified and will read as stated in the Consensus scorebook. See additional findings below that support verification:

The district uses the four-step iterative Relationship Management Process to identify relationship needs (Figure 3.2-1), select and develop relationship management methods, deploy these approaches, and assess and improve the effectiveness of its relationship management. The applicant has established multiple access mechanisms for students and stakeholders to find information, make complaints, and/or communicate with the district (Figure 3.2-1), and it uses the Relationship Management Process to determine contact requirements for each mode of access (Figure 3.2-2).

2. Clarifies how contact requirements are deployed to staff and integrated into processes addressed in OFI 2. See final conclusion in finding 6.

3. Evidence of complaint data provided, verifying strengths 1 and 2; further information will be gathered through SVI 3.2-2 to further clarify OFI 3.

4. Verifies strengths 1 and 5.

5. Clarifies how the applicant deploys contact mechanism information to parents appropriate to their needs and preferences, further clarifying OFI 2. See final conclusion in finding 6.

6. Clarifies that staff who are critical points of contact understand expectations, capture and record contact information in the SIMS, and are measured on their performance in maintaining these processes. As a result of conclusions to questions 2, 5, and 6, OFI 2 will be removed.

7. Verifies strength 5 with no further detail discovered. Comment will read as stated in the Consensus scorebook:

By including a process improvement focus in the last step of the Satisfaction Determination, Relationship Management, and IPM processes, the district keeps its approaches to building and maintaining relationships and determining satisfaction current with educational service needs and directions.

The site visit findings indicate that the processes and/or results investigated would have the following effect on scoring:

raise_x__ , no effect on ___ , or lower___ the consensus evaluation.

(OFI 2 contributed to gap in deployment that was depressing the score.)

Site Visit Issue Worksheet (Record only one issue per page.)

Item Reference: 3.2-2 *Not originally evaluated at consensus* ______

Issue: **Verify and clarify the approach, deployment, and learning in the Inquiry and Problem Management Process.**

Comment(s) affected: (An SVI addresses one or more comments in the consensus scorebook so that by the end of the site visit all OFI's, double pluses, and strength comments linked to a key theme in the final scorebook have been verified or clarified. List the comments found in the consensus scorebook that are addressed by the findings and conclusions concerning this issue, *e.g., 1.1 first +, 1.1 first OFI, KTa.2, and 5.3 second +*)
Strengths 2 and 5; OFI 3

Strategy: (What information do you need, and how do you intend to obtain it, i.e., persons to interview, specific questions to ask each person [including walk-around questions to check deployment], specific documents to review and for what purpose, and observations to make? Be sure your strategy will address the overall issue as well as the comments listed above.)

Interview the owner of the Inquiry and Problem Management Process and address the following questions:

1. Describe the 6-step process (Strength # 2)
2. Show sources of complaints and summary of what complaint subject or areas are addressed.
3. Determine if all complaints are recorded.
4. For complaints regarding IT, does the IT Partner handle complaints through the same process? Do they aggregate complaint reasons and trends and use them to plan future technology improvements (OFI # 3)
5. Describe how complaint data are used in the Student and Stakeholder Requirements Determination Process.
6. How do you evaluate and improve the process. Look for evidence of benchmarking, best practices, actual improvements made, other innovative ways to improve. (Strength # 4)
7. Look for any linkages between improvements made to the process and how they relate to changing educational service needs and directions, or changing stakeholder expectations.

Documents:

1. Output from the IPM system to ascertain if data are segmented, summarized into trends and who the data is distributed to.
2. Output from the IPM system – Look at trends and levels, comparisons – **coordinate with Category 7**.
3. Evidence that demonstrates that complaints are resolved within one to five business days. (coordinate with Cat 7)
4. Evidence that complaints are used in the Strategic Planning Process (coordinate with Category 2)

Walk-around question – specifically for at least 2 "owner(s)" responsible for resolving complaints

Take me through the process of how you received a complaint, handled it, and logged it in IPM.

Findings: (What observations, specific answers, and/or updated results did you find during the site visit? Be specific and include data as appropriate.)

Conclusions: (What is the resolution of this site visit issue based on your findings? For each comment referenced in "Comments affected" indicate 1) the action you will take, e.g., delete/modify/no change; 2) the specific findings that lead you to that action, and 3) the final wording of the comment as it will appear in the site visit scorebook. If a new comment is required it should be included in this section as well.)

Note: Conclusions should address actions taken as a result of finding for Strength # 2 and # 4, and OFI # 3

The site visit findings indicate that the processes and/or results investigated would have the following effect on scoring:

raise___ , no effect on ___ , or lower___ the consensus evaluation.

Site Visit Issue Worksheet (Record only one issue per page.)

Item Reference: 3.2-3 *Not originally evaluated at consensus* ______

Issue: **Verify and clarify the approach, deployment and cycles of improvement of the Satisfaction Determination Process.**

Comment(s) affected: (An SVI addresses one or more comments in the consensus scorebook so that by the end of the site visit all OFI's, double pluses, and strength comments linked to a key theme in the final scorebook have been verified or clarified. List the comments found in the consensus scorebook that are addressed by the findings and conclusions concerning this issue, *e.g., 1.1 first +, 1.1 first OFI, KTa.2, and 5.3 second +*)

Strengths 3, 4, and 5; OFI 4

Strategy: (What information do you need, and how do you intend to obtain it, i.e., persons to interview, specific questions to ask each person [including walk-around questions to check deployment], specific documents to review and for what purpose, and observations to make? Be sure your strategy will address the overall issue as well as the comments listed above.)

Interview the owner of the Satisfaction Determination Process and address the following questions:

1. Describe the 5-step process (Strength # 3)
2. Describe the formal and informal methods employed to assess student and stakeholder satisfaction including focus groups, annual surveys of students, parents, alumni, school board members, taxpayers, and business leaders.
3. Show examples of how data are aggregated and analyzed including identifying segments and differences within segments. (OFI # 4)
4. How do you use results of surveys and other informal methods (link to HR strategy development in Item 2.0)
5. Identify actions taken from survey results that can relate specifically to addressing a diverse student or stakeholder population. (cause and effect relationship between survey results and improvements) (OFI # 4)
6. Other than complaints, what other indicators of dissatisfaction are collected and used for improvements? (OFI # 4)
7. How do you evaluate and improve the process. Look for evidence of benchmarking, best practices, actual improvements made, other innovative ways to improve. (Strength # 3 and #5
8. Look for any linkages between improvements made to the process and how they relate to changing educational service needs and directions, or changing stakeholder expectations

Documents:

1. K-news articles that address results of satisfaction surveys (Strength 3)
2. Copies of last 3 satisfaction surveys for each stakeholder group including summary analysis used to communicate results and determine actions. Look for evidence of comparative data. (Strength 3 and 4)
   a. Segmented data by diverse groups
   b. Actions addressing segmented data
   c. Survey results for key data and feedback – morale, meeting needs, leadership, etc.

Walk-Around Question:

Have you participated in any staff or student surveys? Are you aware of the results? Are they used constructively for improvements? Can you give me an example?

Findings: (What observations, specific answers, and/or updated results did you find during the site visit? Be specific and include data as appropriate.)

Conclusions: (What is the resolution of this site visit issue based on your findings? For each comment referenced in “Comments affected” indicate 1) the action you will take, e.g., delete/modify/no change; 2) the specific findings that lead you to that action, and 3) the final wording of the comment as it will appear in the site visit scorebook. If a new comment is required it should be included in this section as well.)

Note: Conclusions should address actions taken as a result of finding for Strength # 1 and # 4, and OFI # 2

The site visit findings indicate that the processes and/or results investigated would have the following effect on scoring:

raise___ , no effect on ___ , or lower___ the consensus evaluation.

Site Visit Issue Worksheet (Record only one issue per page.)

Item Reference: 3.2-4 *Not originally evaluated at consensus* ______

Issue: **Clarify how the applicant identifies contact requirements for other stakeholders.**

Comment(s) affected: (An SVI addresses one or more comments in the consensus scorebook so that by the end of the site visit all OFI's, double pluses, and strength comments linked to a key theme in the final scorebook have been verified or clarified. List the comments found in the consensus scorebook that are addressed by the findings and conclusions concerning this issue, *e.g., 1.1 first +, 1.1 first OFI, KTa.2, and 5.3 second +*)

OFI 1

Strategy: (What information do you need, and how do you intend to obtain it, i.e., persons to interview, specific questions to ask each person [including walk-around questions to check deployment], specific documents to review and for what purpose, and observations to make? Be sure your strategy will address the overall issue as well as the comments listed above.)

Interview the owner of the Relationship Management Process and address the following questions:

1. How do you determine contact requirements for stakeholder groups such as: (looking for systematic approach)
   a. Taxpayers without children
   b. Businesses
   c. ESL Students (English as a second language)
   d. New Chance for Success students (NCS)
   e. Any other special segments
2. Cite methods used to build positive referrals - examples
3. Cite methods used to build continuous interactions with all stakeholder groups - examples

Documents:

1. Evidence of requirements defined for the above stakeholder groups?
2. Evidence of referrals?

Findings: (What observations, specific answers, and/or updated results did you find during the site visit? Be specific and include data as appropriate.)

Conclusions: (What is the resolution of this site visit issue based on your findings? For each comment referenced in “Comments affected” indicate 1) the action you will take, e.g., delete/modify/no change; 2) the specific findings that lead you to that action, and 3) the final wording of the comment as it will appear in the site visit scorebook. If a new comment is required it should be included in this section as well.)

Note: Conclusions should address actions taken as a result of finding for OFI # 1. Because it was a (--) it should have a specific SVI associated with it.

The site visit findings indicate that the processes and/or results investigated would have the following effect on scoring:

raise___ , no effect on ___ , or lower___ the consensus evaluation.

Site Visit Issue Worksheet (Record only one issue per page.)

Item Reference: ________________________ *Not originally evaluated at consensus* ______

Issue:

Comment(s) affected: (An SVI addresses one or more comments in the consensus scorebook so that by the end of the site visit all OFI's, double pluses, and strength comments linked to a key theme in the final scorebook have been verified or clarified. List the comments found in the consensus scorebook that are addressed by the findings and conclusions concerning this issue, *e.g., 1.1 first +, 1.1 first OFI, KTa.2, and 5.3 second +*)

Strategy: (What information do you need, and how do you intend to obtain it, i.e., persons to interview, specific questions to ask each person [including walk-around questions to check deployment], specific documents to review and for what purpose, and observations to make? Be sure your strategy will address the overall issue as well as the comments listed above.)

Findings: (What observations, specific answers, and/or updated results did you find during the site visit? Be specific and include data as appropriate.)

Conclusions: (What is the resolution of this site visit issue based on your findings? For each comment referenced in "Comments affected" indicate 1) the action you will take, e.g., delete/modify/no change; 2) the specific findings that lead you to that action, and 3) the final wording of the comment as it will appear in the site visit scorebook. If a new comment is required it should be included in this section as well.)

The site visit findings indicate that the processes and/or results investigated would have the following effect on scoring:

raise___ , no effect on ___ , or lower___ the consensus evaluation.

Site Visit Issue Worksheet (Record only one issue per page.)

Item Reference: ______________________ *Not originally evaluated at consensus* ______

Issue:

Comment(s) affected: (An SVI addresses one or more comments in the consensus scorebook so that by the end of the site visit all OFI's, double pluses, and strength comments linked to a key theme in the final scorebook have been verified or clarified. List the comments found in the consensus scorebook that are addressed by the findings and conclusions concerning this issue, *e.g., 1.1 first +, 1.1 first OFI, KTa.2, and 5.3 second +*)

Strategy: (What information do you need, and how do you intend to obtain it, i.e., persons to interview, specific questions to ask each person [including walk-around questions to check deployment], specific documents to review and for what purpose, and observations to make? Be sure your strategy will address the overall issue as well as the comments listed above.)

Findings: (What observations, specific answers, and/or updated results did you find during the site visit? Be specific and include data as appropriate.)

Conclusions: (What is the resolution of this site visit issue based on your findings? For each comment referenced in "Comments affected" indicate 1) the action you will take, e.g., delete/modify/no change; 2) the specific findings that lead you to that action, and 3) the final wording of the comment as it will appear in the site visit scorebook. If a new comment is required it should be included in this section as well.)

The site visit findings indicate that the processes and/or results investigated would have the following effect on scoring:

raise___ , no effect on ___ , or lower___ the consensus evaluation.
